



Simplify Operations, Spend Smarter.

USER GUIDE

Creating Goal-driven Campaigns (June 2022)

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1 Goal-driven campaigns

You can use goal-driven campaigns to invite a number of your suppliers and customers to get to know and to adopt Basware services.

Campaign goals

Goal-driven campaigns are based on a goal that you wish to achieve through that campaign. You may, for example, want to:

- Start receiving electronic invoices from your suppliers
- Sign new early payment agreements
- Set up dynamic discounting programs
- Update and enrich supplier data

Campaign types

You can create different types of goal-driven campaigns based on what the needs of your business are:

Table 1: Campaign types

Type	Invitation method	Landing page
Full Basware solution	Basware invitations	Basware landing page
Basware landing page only	Own invitation method	Basware landing page
Own invitations and landing page	Own invitation method	Own landing page

2 Create a campaign using Basware landing page and invitation emails

To create a campaign that uses a landing page provided by Basware and invitations sent through Basware Network:

1. [Create a campaign and set campaign goal\(s\)](#)
2. [Set the campaign's parameters](#)
3. [Choose the invitees](#)
4. [Set up a landing page for the campaign](#)
5. [Set up the invitation](#)
6. [Review the information and start the campaign](#)

2.1 Create campaign and set campaign goals



1. Log in to [Basware Network](#).
2. Click **Network** > **Campaigns**.
3. Click **Create New Campaign**.
4. To offer an early payment option to your suppliers, select **Get discount on early payment**.

When you select this option, you must set the following parameters:

- **Discount rate in %:** The maximum discount rate you want to receive in exchange for early payment.
- **Set payment terms in days:** Payment term in days.

You must also define how the early payment option works from the supplier's perspective:

- **On Demand (Flexible):** The supplier can decide whether they want to receive an early payment separately for each eligible invoice. The supplier can switch to using the automatic mode.
 - **Automatic (Flexible):** Each invoice the supplier sends is automatically directed to early payment. The supplier can switch to using the On demand mode.
 - **Automatic (Fixed):** Each invoice the supplier sends is automatically directed to early payment. The supplier cannot switch to using the On demand mode.
5. To promote e-invoicing to your suppliers, select **Promote e-invoicing to enable automation**.
When you select this option, you must set the following parameters:
 - **Activated suppliers in %:** Define the target rate of suppliers who switch to sending e-invoices through this campaign.
 6. To update and enrich your supplier's information, select **Update and enrich supplier data**.
When you select this option, you must set the following parameters:
 - **Select template:** Select a template that defines the details that your suppliers need to update.
 - **Updated data in %:** Define the target rate of requested details that your suppliers fill in or update.

7. Click **Set as primary** next to the goal that you want to set as the primary goal of your campaign.
8. Click **Next** to [set the campaign parameters](#).

2.2 Set campaign parameters



1. In the **Campaign name** field, enter a name for the campaign.
2. Set the start and end dates for the campaign:
 - a) Click the **Start date** field to set a start date for the campaign.
 - b) In the **Start time** drop-down list, select the start time of the campaign.
 - c) Click the **End date** field to set an end date for the campaign.
3. Select **I want to use the standard landing page**.
4. Under **Select invitation methods**, select **Email - Basware delivers the link to the landing page to the invitees (RECOMMENDED)**.
5. To use email addresses stored in Basware Network, select the **Use Basware emails** check box.
6. Click **Next** to [choose the invitees](#).

2.3 Choose invitees



1. Import invitees from CSV files (optional).
 - a) Next to **Import CSV file**, click ➤ to expand the section.
 - b) To import a CSV file, click **select files**, or drag and drop a CSV file to the gray area.
 - c) From the **Email language** drop-down list, select the language of the email message you want to send to these recipients.



You can upload up to 20 CSV files. You can define the language for each CSV file that you import separately.

- d) Repeat the process to create additional groups of invitees.
2. Define invitees by pasting their email addresses (optional).
 - a) Next to **Paste multiple mails**, click ➤ to expand the section.
 - b) Paste a group of email addresses in the text box.

All email addresses that you paste at a time are grouped together, and each invitee will receive the invitation in the same language.
 - c) Click **Review and add**.
 - d) From the **Language** drop-down list, select the language of the invitation you want to send to these invitees.
 - e) Repeat the process to create additional groups of invitees.
3. Add invitees by manually entering their details (optional).
 - a) Next to **Add single recipient**, click ➤ to expand the section.
 - b) Enter the invitee's details in the **First Name**, **Last Name** and **Email** fields.
 - c) Click **Add**.

- d) From the **Language** drop-down list, select the language of the invitation you want to send to this invitee.
- e) Repeat the process to add more invitees.
- 4. Click **Next** to [set up the landing page](#).

2.4 Set up the landing page

If you want to customize the landing page, you can add your company logo and custom message.



1. To add your company's logo to the landing page, click **select files**, or drag and drop your company's logo to the **Company logo file** area.



If you want to add your company's logo to the landing page, you must also add a custom message to the landing page.

2. To add a custom message to the landing page, enter the message in the **Your message** text box (optional).
3. Click **Preview** to preview the landing page.
4. Click **Next** to [set up the invitation](#).

2.5 Set up the invitation



1. In the **Reply to email** field, enter the email address that you want the reply email to be sent to when the recipient replies to the invitation email.
2. Add your company's logo to the email message (optional).
 - a) Select the **Use company logo in invitation email** check box.
 - b) To add your company's logo, click **select files**, or drag and drop your company's logo to the **Specify another company logo** area.
3. Add attachments to the email message (optional).
 - a) To add an attachment, click **select files**, or drag and drop your attachment to the **Attachments** section.
4. Click **Preview Email** to preview the email before you send it.
5. Click **Send test email** to send a test invitation.

Enter the address to which you want to send the test email in the **Email Address** field, and click **Send**.
6. Click **Next** to [review the campaign details](#).

2.6 Review campaign details and start the campaign



1. Review the campaign details.

Click **Previous** to go back and make changes to the information you provided, if needed.

2. Under **Select languages to start campaign**, select the languages that the campaign is presented in.
3. Click **Complete** to start the campaign.

3 Create a campaign using Basware landing page and your own invitation method

To create a campaign using Basware provided landing page and your own invitation method:

1. [Create a campaign and set campaign goal\(s\)](#)
2. [Set the campaign's parameters](#)
3. [Set up a landing page for the campaign](#)
4. [Review the information and start the campaign.](#)

3.1 Create campaign and set campaign goals



1. Log in to [Basware Network](#).
2. Click **Network** > **Campaigns**.
3. Click **Create New Campaign**.
4. To offer an early payment option to your suppliers, select **Get discount on early payment**.

When you select this option, you must set the following parameters:

- **Discount rate in %:** The maximum discount rate you want to receive in exchange for early payment.
- **Set payment terms in days:** Payment term in days.

You must also define how the early payment option works from the supplier's perspective:

- **On Demand (Flexible):** The supplier can decide whether they want to receive an early payment separately for each eligible invoice. The supplier can switch to using the automatic mode.
 - **Automatic (Flexible):** Each invoice the supplier sends is automatically directed to early payment. The supplier can switch to using the On demand mode.
 - **Automatic (Fixed):** Each invoice the supplier sends is automatically directed to early payment. The supplier cannot switch to using the On demand mode.
5. To promote e-invoicing to your suppliers, select **Promote e-invoicing to enable automation**.
When you select this option, you must set the following parameters:
 - **Activated suppliers in %:** Define the target rate of suppliers who switch to sending e-invoices through this campaign.
 6. To update and enrich your supplier's information, select **Update and enrich supplier data**.
When you select this option, you must set the following parameters:
 - **Select template:** Select a template that defines the details that your suppliers need to update.
 - **Updated data in %:** Define the target rate of requested details that your suppliers fill in or update.
 7. Click **Set as primary** next to the goal that you want to set as the primary goal of your campaign.
 8. Click **Next** to [set the campaign parameters](#).

3.2 Set campaign parameters



1. In the **Campaign name** field, enter a name for the campaign.
2. Set the start and end dates for the campaign:
 - a) Click the **Start date** field to set a start date for the campaign.
 - b) In the **Start time** drop-down list, select the start time of the campaign.
 - c) Click the **End date** field to set an end date for the campaign.
3. Select **I want to use the standard landing page**.
4. Under **Select invitation methods**, select **No email. I will contact the supplier myself**.
5. In the text field, define the URL that you want to use for the campaign.



The full URL follows the format: `https://portal.basware.com/open/<specified URL>`. For example, `https://portal.basware.com/open/acme-einvoicing-campaign`.

6. Click **Validate** to make sure that the URL you specified is accessible.
7. From the **Language** drop-down list, select the language you want to use in the invitation.
8. Click **Next** to [set up the landing page](#).

3.3 Set up the landing page



1. To add your company's logo to the landing page, click **select files**, or drag and drop your company's logo to the **Company logo file** area.



If you want to add your company's logo to the landing page, you must also add a custom message to the landing page.

2. To add a custom message to the landing page, enter the message in the **Your message** text box (optional).
3. Click **Preview** to preview the landing page.
4. Click **Next** to [review the campaign details](#).

3.4 Review campaign details and start the campaign



1. Review the campaign details.
Click **Previous** to go back and make changes to the information you provided, if needed.
2. Under **Select languages to start campaign**, select the languages that the campaign is presented in.
3. Click **Complete** to start the campaign.
4. Deliver the URL you chose when you [set the campaign parameters](#) to the recipients.

4 Create a campaign using your own landing page and invitation method

To create a campaign using Basware provided landing page and your own invitation method:

1. [Create a campaign and set campaign goal\(s\)](#)
2. [Set the campaign's parameters](#)
3. [Review the information and start the campaign.](#)

4.1 Create campaign and set campaign goals



1. Log in to [Basware Network](#).
2. Click **Network** > **Campaigns**.
3. Click **Create New Campaign**.
4. To offer an early payment option to your suppliers, select **Get discount on early payment**.

When you select this option, you must set the following parameters:

- **Discount rate in %:** The maximum discount rate you want to receive in exchange for early payment.
- **Set payment terms in days:** Payment term in days.

You must also define how the early payment option works from the supplier's perspective:

- **On Demand (Flexible):** The supplier can decide whether they want to receive an early payment separately for each eligible invoice. The supplier can switch to using the automatic mode.
 - **Automatic (Flexible):** Each invoice the supplier sends is automatically directed to early payment. The supplier can switch to using the On demand mode.
 - **Automatic (Fixed):** Each invoice the supplier sends is automatically directed to early payment. The supplier cannot switch to using the On demand mode.
5. To promote e-invoicing to your suppliers, select **Promote e-invoicing to enable automation**.
When you select this option, you must set the following parameters:
 - **Activated suppliers in %:** Define the target rate of suppliers who switch to sending e-invoices through this campaign.
 6. To update and enrich your supplier's information, select **Update and enrich supplier data**.
When you select this option, you must set the following parameters:
 - **Select template:** Select a template that defines the details that your suppliers need to update.
 - **Updated data in %:** Define the target rate of requested details that your suppliers fill in or update.
 7. Click **Set as primary** next to the goal that you want to set as the primary goal of your campaign.
 8. Click **Next** to [set the campaign parameters](#).

4.2 Set campaign parameters



1. In the **Campaign name** field, enter a name for the campaign.
2. Set the start and end dates for the campaign:
 - a) Click the **Start date** field to set a start date for the campaign.
 - b) In the **Start time** drop-down list, select the start time of the campaign.
 - c) Click the **End date** field to set an end date for the campaign.
3. Select **I want to use my own landing page**.
4. In the **URL of the landing page** field, enter the URL of the landing page.
5. Click **Validate** to make sure the URL is correct.



When you use a landing page you have setup yourself, make sure that the landing page directs the users to `https://portal.basware.com/join`. Otherwise, the users you invite will not be able to reach the Basware service selection page.

6. Under **Select invitation methods**, select **No email. I will contact the supplier myself**.
7. In the text field, define the URL that you want to use for the campaign.



The full URL follows the format: `https://portal.basware.com/open/<specified URL>`. For example, `https://portal.basware.com/open/acme-einvoicing-campaign`.

8. From the **Language** drop-down list, select the language you will use in the invitation.
9. Click **Next** to [review the campaign details](#).

4.3 Review campaign details and start the campaign



1. Review the campaign details.

Click **Previous** to go back and make changes to the information you provided, if needed.
2. Under **Select languages to start campaign**, select the languages that the campaign is presented in.
3. Click **Complete** to start the campaign.
4. Deliver the URL you chose when you [set the campaign parameters](#) to the recipients.

5 End and restart campaigns

5.1 End a campaign

You can end a campaign before the campaign's original end date on the **Network** page.



1. On the **Campaigns** view, scroll down to the campaign you want to end.
2. Next to the campaign that you want to end, click **End now** to end the campaign.

5.2 Restart an expired campaign

You can restart an expired campaign by editing the start and end dates of the campaign. Manage open campaigns on the **Network** page.



1. On the **Campaigns** view, scroll down to the open campaign you want to restart.
2. Next to the campaign that you want to restart, click **Edit**.
3. Click the **Start date** and **End date** fields to set a new start and end date for the campaign.
4. Click **Save** to save your changes and restart the campaign.

6 Campaign statistics

6.1 Download campaign statistics

You can download campaign statistics on the **Network** page. Campaign statistics collect information about the users who participated in a campaign. From campaign statistics, you can see, for example:

- The type of the campaign
- When the invitations for the campaign were sent
- The names and contact information of the invitees
- When the invitees joined the campaign



1. On the **Campaigns** view, scroll down to a campaign.
2. In the drop-down list next to the campaign you want, select **Download CSV file**.

You can also download a collection of the statistics of all active campaigns by clicking **Download All**.

A CSV file that contains the campaign statistics is downloaded to your device.

6.2 Examining campaign statistics

Basware Network collects details about each campaign that you run using the campaign tool. You can [download each campaign's statistics](#) in Basware Network and examine the results. For descriptions of all columns used on the campaign report, see [Contents of a campaign report](#).

Email-based campaigns

The most relevant parts of the [campaign report](#) for email-based campaigns are columns L-O and columns P-X.

Table 2: User progress after they have received an invitation email

Column	Field content	Information
L	Invitation email sent	Contains the timestamp of when the invitation email was sent to the invitee. If the invitee proceeds to click the invitation link within a week, the next timestamp the service logs is in column P.
M, N, O	Timestamps of the first, second, and third reminder messages	If the invitee does not open the invitation link within a week, the service will send them three reminders. The times at which the reminders have been sent will be logged in columns M, N, and O. Once the invitee opens the link to the registration page of the service, their progress is tracked within columns P-X.

Once the user clicks the link in either the original invitation or one of the reminder messages, their progress is tracked in columns P-X:

Table 3: User progress on the registration page

Column	Field content	Information
P	Registration page reached	This column contains the timestamp of when the user has opened the registration page of a service. If the user has not yet opened the registration page, this field contains the value FALSE.
Q	Offering page reached	This column contains the timestamp of when the invitee has accessed the offering page. If the user has not yet opened the offering page, this field contains the value FALSE.
R	Rejected	If the invitee already has an e-invoicing system or they have chosen not to accept any of the offered services, this field contains the value TRUE.
S	Create password page reached	Contains the timestamp of when the invitee accessed the create account page and entered a valid email address and a password for starting the registration process.
T	Waiting account confirmation	Contains the timestamp of when Basware Network issued a confirmation email — an email with a link the user clicks to confirm their account — to the invitee. If the previous column contains a timestamp, but this column contains the value FALSE: <ul style="list-style-type: none"> The invitee already has a user account in Basware Network. Check column V. The invitee has accessed the registration page but has chosen not to create a user account.
U	Account confirmed	Contains the timestamp of when the user has confirmed their user account by clicking the link in the account confirmation email that Basware Network has sent them. If the previous column contains a timestamp, but this column contains the value FALSE: <ul style="list-style-type: none"> The invitee already has a user account in Basware Network. Check column V. The invitee has created an account but has not yet confirmed the user account.
V	Account used	Contains the timestamp of when the user logged in to Basware Network for the first time.

Column	Field content	Information
W	Service activated	Contains the timestamp of when the user successfully completed the configuration of the service they were invited to and activated the service. If there is a timestamp in column V but none in this column, the user has started the registration process, but has not finished filling in their organization details or activated the service.
X	Service used	Contains the timestamp of when the first invoice was successfully processed and delivered to the client. If the invitee has sent an invoice to a business unit different from the one that invited them, then this field contains the value FALSE.

URL-based campaigns

The most interesting parts of the [campaign report](#) are columns P-X.

Once the user opens the URL that they received, their progress is tracked in columns P-X:

Table 4: User progress on the registration page

Column	Field content	Information
P	Registration page reached	This column contains the timestamp of when the user has opened the registration page of a service. If the user has not yet opened the registration page, this field contains the value FALSE.
Q	Offering page reached	This column contains the timestamp of when the invitee has accessed the offering page. If the user has not yet opened the offering page, this field contains the value FALSE.
R	Rejected	If the invitee already has an e-invoicing system or they have chosen not to accept any of the offered services, this field contains the value TRUE.
S	Create password page reached	Contains the timestamp of when the invitee accessed the create account page and entered a valid email address and a password for starting the registration process.

Column	Field content	Information
T	Waiting account confirmation	<p>Contains the timestamp of when Basware Network issued a confirmation email — an email with a link the user clicks to confirm their account — to the invitee.</p> <p>If the previous column contains a timestamp, but this column contains the value FALSE:</p> <ul style="list-style-type: none"> The invitee already has a user account in Basware Network. Check column V. The invitee has accessed the registration page but has chosen not to create a user account.
U	Account confirmed	<p>Contains the timestamp of when the user has confirmed their user account by clicking the link in the account confirmation email that Basware Network has sent them.</p> <p>If the previous column contains a timestamp, but this column contains the value FALSE:</p> <ul style="list-style-type: none"> The invitee already has a user account in Basware Network. Check column V. The invitee has created an account but has not yet confirmed the user account.
V	Account used	Contains the timestamp of when the user logged in to Basware Network for the first time.
W	Service activated	<p>Contains the timestamp of when the user successfully completed the configuration of the service they were invited to and activated the service.</p> <p>If there is a timestamp in column V but none in this column, the user has started the registration process, but has not finished filling in their organization details or activated the service.</p>
X	Service used	Contains the timestamp of when the first invoice was successfully processed and delivered to the client. If the invitee has sent an invoice to a business unit different from the one that invited them, then this field contains the value FALSE.

6.3 Contents of a campaign report

You can download campaign reports in CSV format. The CSV file is made up of several columns that you can use to examine the campaign.

Note that while the columns used on the campaign report are the same for each campaign type, the information stored in certain columns is only applicable to specific campaign types. If a column is applicable to a specific campaign type only, this is noted in the table below.

CSV column	Field content	Comment
A	Campaign Type	Describes whether this is an open, URL-based campaign or an email-based campaign.
B	Campaign name	Contains the name or label of the campaign that was given when the campaign was created.
C	Application name	Contains the name of the Basware service that the campaign was created for.
D	Invitee ID	Contains the unique Portal identifier number.
E	Invitee Party ID	Contains the identifier and scheme given by the invitee (for example, VAT-ID, DUNS number) both during the onboarding process and later on when they have edited their company details.
F	Invitee Country	Contains the country selected by the invitee during the registration process.
G	Invitee Name	Contains the name given by the invitee during the registration process.
H	Invitation Name	Contains the name of the person that the invitation was issued to. This field is applicable to email-based campaigns only.
I	Invitation Email	Contains the email address the invitation was issued to. This field is applicable to email-based campaigns only.
J	Contact Email	Contains the email address of the person who was set as the main point of contact for the invitee company during the onboarding process.
K	Invitation URL	Contains the unique token link that is used for tracking the invitation. This field is applicable to email-based campaigns only. In URL-based campaigns, the service creates a token only when a user visits the registration page of the campaign.
L	Invitation email sent	Contains the timestamp of when the invitation email was sent to the invitee. This field is applicable to email-based campaigns only.
M	First reminder sent	Contains the timestamp of when the first reminder was sent to the invitee. This field is applicable to email-based campaigns only.
N	Second reminder sent	Contains the timestamp of when the second reminder was sent to the invitee. This field is applicable to email-based campaigns only.

CSV column	Field content	Comment
O	Third reminder sent	Contains the timestamp of when the third and final reminder was sent to the invitee. This field is applicable to email-based campaigns only.
P	Registration page reached	Contains the timestamp of when the invitee accessed the registration page of the campaign.
Q	Offering page reached	Contains the timestamp of when the invitee accessed the offering page of the campaign.
R	Rejected	Contains information on whether the invitee rejected the invitation or not.
S	Create account page reached	Contains the timestamp of when the invitee accessed the account creation page.
T	Waiting account confirmation	Contains the timestamp of when the user entered their username and password, and when Basware Network issued a confirmation email — an email with a link that the user clicks to confirm their account — to the invitee.
U	Account confirmed	Contains the timestamp of when the user confirmed their user account by clicking the confirmation link in the confirmation email that they received.
V	Account used	Contains the timestamp of when the user logged in to Basware Network for the first time.
W	Service activated	Contains the timestamp of when the user successfully completed the configuration of the service that they were invited to and activated the service.
X	Service used	Contains the timestamp of when the first invoice was successfully processed and delivered to the client. If the invitee has sent an invoice to a business unit different from the one that invited them, this field contains the value FALSE.

7 Contact Basware Support

If you cannot find the information you are looking for in this document, please have a look at the [Online Help](#). In case you cannot find the information you are looking for there, either, please contact Basware Support. The Basware Support personnel will assist you in using the application and send all suggestions for improvement related to the applications or documentation to the supplier of the system.

To find the contact information of Basware Support, visit [Basware Knowledge Base](#).